

PIMS V. 5.3 ADT Module User Manual

Copay Exemption Test Supervisor Menu

Copay Exemption Test User Menu

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Overview

The Copay Exemption Test Supervisor menu contains the options used in all aspects of Copay Testing. This includes adding, editing, deleting, viewing past Copay Tests and editing activity, and listing incomplete tests. The following is a brief description of the options contained in this menu.

COPAY EXEMPTION TEST USER MENU

ADD A COPAY EXEMPTION TEST

This option allows adding a new Copay Test into the system.

COPAY EXEMPT TEST NEEDING UPDATE AT NEXT APPT.

This option is used to generate a listing of future appointments listing Copay Exemption Tests which will require updating.

EDIT AN EXISTING COPAY EXEMPTION TEST

This option is used to make changes to data in existing Copay Tests.

LIST INCOMPLETE COPAY EXEMPTION TEST

This option is used to generate a listing of patients who have an incomplete Copay Test on file.

VIEW A PAST COPAY TEST

This option is used to view past Copay Test data.

DELETE A COPAY EXEMPTION TEST

This option is used to delete individual dates of Copay Tests for a specified patient from the ANNUAL MEANS TEST file (#408.31).

VIEW COPAY EXEMPTION TEST EDITING ACTIVITY

This option provides a method of viewing changes made to Copay Test data.

Copay Exemption Test User Menu

Add a Copay Exemption Test

The Add a Copay Exemption Test option is used to enter a new Copay Test into the system. Only one date of test should exist for a patient annually. The following rules apply to adding a Copay Test.

- the date of test cannot be before 10/29/92
- the date of test cannot be before the last date of test
- a new date of test cannot be added if one exists in the last 365 days unless it is a new calendar year

The Copay Test information is based on the last calendar year and is entered through a series of screens. After editing, each screen is redisplayed with the new values. Based on the financial information entered and the income thresholds established, the system determines the appropriate Copay Test status for the patient.

Screen 1 of this option uses the List Manager utility. The List Manager is a tool designed to display a list of items. It allows you to select items from the list and perform specific actions against those items.

Screen 1 - Marital Status/Dependents is used to enter data on the veteran's spouse and dependent children. Name, social security number, sex, and date of birth must be entered for the veteran's spouse and dependent children if it has not already been filled in through registration. This information is extremely important as it is critical in determining the annual income thresholds for the veteran.

Spouse and dependent children income collection is dependent on several factors. The spouse's income need only be entered if the spouse lived with the veteran last calendar year or, if they did not live together, the veteran contributed at least \$600 to the spouse's support. Dependent children income is only required if the child had income which was available to the veteran last calendar year. The following is a brief explanation of some of the actions which may be taken.

Copay Exemption Test User Menu

Add a Copay Exemption Test

DD - In order to edit the dependent demographics, the selected dependent has to be active and associated with the Copay Test.

DP - Delete Dependent functionality requires that the user hold the DG DEPDELETE security key. This functionality should be mainly used to delete duplicate dependents. In order to delete a dependent, they must be removed from every Copay Test (using the RE protocol).

CD - Copy Data can only be used if there is previous year income on file and no income on file for this year.

ED - Expand Dependent will move to another screen (Expand Dependent). It is used to edit the effective date (date the person became a dependent of the veteran).

Screen 2 - Previous Calendar Year Gross Income is used to enter income information such as military retirement, total employment income, and social security. Some fields may be filled in from information collected in registration. Depending on the information entered on Screen 1, this screen may appear with one column (veteran), two columns (veteran/spouse), or three columns (veteran/spouse/dependents). The required information will be prompted for each column shown. The item number(s) you select for editing may be preceded by V (veteran), S (spouse), or C (children) to select those specific fields; otherwise, the fields for all three will be displayed.

If the veteran declines to give income information, s/he is given a status of NON-EXEMPT and is NOT exempt from copay.

Screen 3 - Deductible Expenses is used to enter any medical, funeral/burial expenses, and children's educational expenses. A child's educational expenses can only be claimed if the child had total employment income.

You may choose to print the Financial Worksheet, VAF 10-10F, when the Copay Test is completed.

Access to this option is limited to holders of the DG MEANSTEST security key.

Copay Exemption Test User Menu
Copay Exempt Test Needing Update At Next Appt.

The Copay Exempt Test Needing Update At Next Appt. option is used to generate a listing of future appointments for a selected date range. The output will list copay exemption tests which will require updating by that appointment time.

You may select to report one/many/all divisions and one/many/all clinics. The output includes the date range, report run date, clinic name, and division. Patient name, patient ID, appointment date/time, Copay Test status, and date of last Copay Test are provided for each patient listed.

Copay Exemption Test User Menu

Edit an Existing Copay Exemption Test

The Edit an Existing Copay Exemption Test option is used to make changes to data in existing Copay Tests. It may also be used to complete Copay Tests on patients. Only the latest Copay Test may be edited.

The Edit a Copay Exemption Test option operates similarly to the Add a Copay Exemption Test option; however, it is the only option which allows changes to completed Copay Tests. After these changes are entered, the system redetermines the patient's Copay status and changes it, if necessary.

The date(s) and name(s) of individual(s) making changes is recorded by the system and may be seen through the View Copay Exemption Test Editing Activity option.

A patient may apply for a Copay Test under the following conditions.

- Applicant is a veteran
- Applicant's primary or other eligibility does NOT contain:
 - service connected 50% to 100% **or**
 - aid and attendance **or**
 - housebound **or**
 - VA pension
- Primary eligibility is NSC and a Means Test is not required
- Applicants who have answered NO to receiving A&A, HB, or pension
- Applicants who have previously qualified and applied for a Copay exemption, still qualify, and have NOT been Copay Tested in the past year

Should these criteria change, a Copay Test status of NO LONGER APPLICABLE will be assigned to the Copay Test. Tests with this status CANNOT be edited.

The following is a brief explanation of some of the actions which may be taken on Screen 1 - Marital Status/Dependents.

DD - In order to edit the dependent demographics, the selected dependent has to be active and associated with the Copay Test.

DP - Delete Dependent functionality requires that the user hold the DG DEPDELETE security key. This functionality should be mainly used to delete duplicate dependents. In order to delete a dependent, they must be removed from every Copay Test (using the RE protocol).

Copay Exemption Test User Menu

Edit an Existing Copay Exemption Test

CD - Copy Data can only be used if there is previous year income on file and no income on file for this year.

ED - Expand Dependent will move to another screen (Expand Dependent). It is used to edit the effective date (date the person became a dependent of the veteran).

Depending on the information entered on Screen 1, Screen 2 may appear with one column - veteran; two columns - veteran/spouse; or three columns - veteran/spouse/dependents. The required information will be prompted for each column shown. The item number(s) you select for editing may be preceded by V (veteran), S (spouse), or C (children) to select those specific fields; otherwise, the fields for all three will be displayed.

Screen 1 of this option uses the List Manager utility. The List Manager is a tool designed to display a list of items. It allows you to select items from the list and perform specific actions against those items.

You may print the VAF 10-10F, Financial Worksheet, when the Copay Test is complete.

You may not edit or delete a Copay Exemption Test that was created at another VAMC and distributed by the HEC.

Access to this option is limited to holders of the DG MEANSTEST security key.

Copay Exemption Test User Menu

List Incomplete Copay Exemption Test

The List Incomplete Copay Exemption Test option is used to generate a listing of patients who have an incomplete Copay Test on file. The patient name, patient ID number, source of test, and date of test are provided. The patients are listed in alphabetical order on the output.

You will be prompted for the Copay Test status, a date range, and a device.

Copay Exemption Test User Menu

View a Past Copay Test

The View a Past Copay Test option is used to view past Copay Tests data. The option does not allow editing. You will be prompted for the patient's name and the date of the Copay Test you wish to view. A question mark (?) entered at the date prompt will provide you with a list of the selected patient's Copay Test dates.

If certain circumstances exist for the selected patient, messages may be displayed. A message will be printed if no detailed income information is on file for the veteran, or if the veteran's Copay Test status is NO LONGER APPLICABLE. Since income data can be entered/edited through registration, once a Copay Test has this status, the income data being viewed may differ from that originally entered as part of the Copay Test.

You will be able to view the following three Copay Test screens through this option.

Screen 1 - Marital Status/Dependents

Screen 2 - Previous Calendar Year Gross Income

Screen 3 - Deductible Expenses

Delete a Copay Exemption Test

The Delete a Copay Exemption Test option is used to delete individual dates of Copay Tests for a specified patient from the ANNUAL MEANS TEST file (#408.31). It can also be used to delete all Copay Tests for a non-veteran patient.

Utilizing this option only deletes the patient's Copay Test status. All information concerning income, assets, debts, spouse, dependent children, etc. is maintained.

You may not edit or delete a Copay Exemption Test that was created at another VAMC and distributed by the HEC.

Only users holding the DG MTDELETE security key may access this option.

View Copay Exemption Test Editing Activity

The View Copay Exemption Test Editing Activity option provides a method of viewing changes made to Copay Test data. The computer keeps track, by patient, each time any change is made to the Copay Test data either through Copay Test or Registration.

The types of changes that are captured are shown below. Both the old and new status value will be shown on the report.

- add new Copay Test
- edit existing Copay Test info
- Copay Test status change

The output generated by this option will include the following information: patient name, Copay Test date, date of change, type of change, and the user who made the change. If no changes have been made to the selected Copay Test, the output will state that fact.

If the selected patient has more than one Copay Test on file, they will be listed for selection.

You must hold the DG MEANSTEST security key to access this option.